

# Trade Invest Monthly

## Hawaii's International Business Network

### State of Hawaii

#### Department of Business, Economic Development & Tourism

To receive the Trade Invest Monthly by Email, please send your request to: [tradeinvest@dbedt.hawaii.gov](mailto:tradeinvest@dbedt.hawaii.gov)

### Hawaii Notices

#### Directory of Hawaii's Ocean Science and Technology Industry Available

The Directory of Hawaii's Ocean Science and Technology Industry (formerly the Ocean Research and Development Directory) is now available from the Ocean Resources Branch of DBEDT.

The directory has been expanded to recognize that many Hawaii companies have gone beyond the research and development stage and are now commercializing their products and services. It categorizes private companies, non-profit organizations, academic research institutions, and government agencies. Also a new section has been added listing the companies and organizations by capability, such as Acoustics, Environmental Monitoring, and Seafloor Mapping.

For more information, contact Elizabeth Corbin at Tel: (808) 587-2680; e-mail: [ecorbin@dbedt.hawaii.gov](mailto:ecorbin@dbedt.hawaii.gov)

#### Visitor Industry Insights Gained From New Research Report

Valuable new data that provide details and insights on Hawaii's visitor market were recently released by DBEDT. The *1999 Annual Visitor Research Report* provides extensive information on the eight major market areas targeted by the Hawaii Tourism Authority, and expands greatly on preliminary data that had been previously released. Data in the report include visitor characteristics by country of origin, island visitation, and month of arrival.

Other highlights from the report include:

- Convention attendance was one of the fastest growing reasons for travel to Hawaii from the Mainland, up nearly 20 percent in 1999;
- The U.S.-East market replaced Japan as the second highest source of visitor expenditures in 1999. The U.S.-West market remained in first place;
- Nearly half of U.S.-East visitors were first-timers in 1999, compared to only 25 percent for the U.S.-West;
- Twenty percent of Japanese visitors came to Hawaii for a wedding or honeymoon, up 16 percent from 1998--the only category in the Japan market to show an increase for 1999;
- Overall, the Japan market showed a nearly 9 percent decline in total visitor days;
- Forty-four percent of European visitors are repeat visitors with an average of two previous trips; and

- Australia and New Zealand (Oceania) constitute one of the highest spending markets at \$194 per person per day and stay for an average 8.5 days.

The report was prepared by DBEDT's Research and Economic Analysis Division. It is available without charge on the DBEDT Web Site, <http://www.hawaii.gov/dbedt/stats.html>. A limited number of printed copies of the reports are available for a nominal charge.

For further information on the reports, contact the DBEDT Business Resource Center at (808) 586-2424, or e-mail to [library@dbedt.hawaii.gov](mailto:library@dbedt.hawaii.gov).

#### 2001 Hawaii Small Business Fair

Representatives from more than 30 organizations that provide free or low cost assistance to small businesses will be featured at this event. Local chambers of commerce and government agencies will also participate.

Free seminars will be taught by business experts on a wide variety of topics, including financing, marketing, and business planning. "Tips and Techniques" will be offered by successful small business owners.

DATE: Saturday, February 10, 2001

TIME: 9:00 a.m. to 4:00 p.m.

PLACE: Leeward Community College

Sponsored by DBEDT, Dept. of Taxation, U.S. Small Business Administration, U.S. Commercial Service, Internal Revenue Service, Leeward Community College, and the Hawaii Small Business Development Center Network.

For more information please contact Winona Chin at (808) 522-8131.

### Worldwide Market Reports

*Due to the large number of requests for reports, we have made the request process easier to better serve you. Complete the request form at the end of the newsletter and Fax to (808) 587-3388, or send an Email message to: [tradeinvest@dbedt.hawaii.gov](mailto:tradeinvest@dbedt.hawaii.gov).*

**The report service offered is reserved for Hawaii companies only.**

*If you are outside of Hawaii and are interested in the reports highlighted in our newsletters, please go to the United States Department of Commerce website, [www.stat-usa.com](http://www.stat-usa.com). You will have the choice of ordering the reports you need for a small fee or you can subscribe to their service for an annual fee and have unlimited access to all reports and services.*

#### Singapore - Giftware Market

The U.S. & Foreign Commercial Service reports that Singapore's retail industry experienced a 13.3% increase at US\$14.1 billion in 1999, and it is projected to continue to grow in 2000.

A large segment of the Singapore retail sector benefits from a common practice of giving gifts among the different ethnic

groups. A summary and key points of this growing sector are as follows;

1. The giftware market size was estimated at US\$709 million in 1998, and US\$1.5 billion in 1999;
2. Imports of giftware into Singapore totaled US\$3.2 billion in 1999. The U.S. products hold a 3% import market share, while Europe has a 19% market share;
3. Tourists provide a substantial market for giftware. In 2000, the Singapore Tourism Board estimated a record of 7.6 million tourists to Singapore, a 10% increase over the 6.95 million in 1999. Top Asian shoppers come from Japan, Indonesia, and India. The top Western shoppers were from the U.K, U.S. and Australia;
4. Gifts are given mainly during the Christmas holidays, birthdays, weddings, Valentine's Day, Secretaries' Week, and Mother's Day;
5. Gifts are also given to a lesser extent during the Chinese holidays of the Lunar New Year and Mid-Autumn Festival;
6. Popular gift items include jewelry, costume jewelry, hair clips, ladies' handbags, crystal ware, stationery items, scarves, ties, lingerie, books, toiletries, candles, wine, chocolates, toys, decorative household accessories, and watches;
7. Corporate gifts include crystal ware, stationery items such as pens, pewter ware, calculators, calendar clocks, name card holders, etc. They tend to be silk-screened with the company logo; and
8. The biggest consumers of gifts are teenagers, younger working adults, and homemakers. Most tend to be women. Most select gifts that are attractive, unique, have good quality, and are a good value.

For a copy of a report, fax the request form to: (808) 587-3388 or by email to [tradeinvest@dbedt.hawaii.gov](mailto:tradeinvest@dbedt.hawaii.gov).

### France – Swimwear Market

The U.S. & Foreign Commercial Service reports that U.S. imports of swimwear into France are expected to increase in the coming years due to "increasing interest in 'American-style' fashions particularly California and Hawaii styles."

- In summary, the key points of the French swimwear market are as follows;
- In 1999, sales of women's swimwear were estimated at US\$247 million. A total of 8.2 million pieces were sold;
- Average price of swimsuits was estimated at US\$31 for women (US\$26 for young women), US\$16 for men, and US\$11 for children;
- French women buy a new swimsuit every three years. Young girls generally buy a new swimsuit every year;
- Women between the ages of 15 and 34 account for 49% of the women's swimwear market in value; and
- In 1999, U.S. imports represented 0.77% of the total import market. However, according to the U.S. & Foreign Commercial Service, American companies are expected to increase market share due to the strong influence of American trends and life-style as represented on television.

More information on the market are provided through the following overviews:

1. Market highlights and best prospects;
2. Competitive analysis – domestic production, third country imports;

3. End-user analysis – most important selection criteria for women;
4. Market access – import climate, distribution/business practices, financing; and
5. Key contacts.

For a copy of a report, send the request form by Fax: (808) 587-3388 or by email to [tradeinvest@dbedt.hawaii.gov](mailto:tradeinvest@dbedt.hawaii.gov).

### Asian Development Bank – Upcoming Projects

The Asian Development Bank (ADB) has approved the following projects, and ADB has issued a cable to provide as much lead-time concerning procurement and consulting opportunities.

The projects are as follows:

#### Proposed US\$2.9 million loan for the Cook Islands Waste Management Project

- Rarotonga's present waste management system is overloaded, and presents health hazards as well as damage to the environment. Capacity of present waste disposal landfill is almost exhausted. Aitukaki has no waste management facility at all.
- According to ADB, the program objective is to "facilitate sustainable and appropriate waste management practices in Rarotonga and Aitukaki. The project will contribute to the achievement of the longer-term goals of safeguarding public health and the environment, supporting private-sector participation in waste management, and increasing public awareness or responsible waste management practices."

#### Executing Agency

Ministry of Finance and Economic Management  
P.O. Box 41, Rarotonga  
Contact: Mr. Kevin Carr, Financial Secretary  
Tel: (682) 23877; Fax: (682) 22878

#### Proposed US\$70.2 million loan project for Indonesia marine and coastal resources management project

- Marine and coastal resources provide important support to Indonesia's economy. Current management does not adequately meet the objectives for protection and sustainable use of coastal resources. The resource use and exploitation has resulted in widespread environmental damage.
- According to ADB, the program objective is to "assist the local government and relevant national agencies in strengthening their capacity for proper planning and management of marine and coastal resources, and addressing the related issues in the context of the on-going decentralization process. The project has four components: (coastal marine resources planning and management; spatial data and information management; marine and coastal resources laws and enforcement; and small-scale natural resources management schemes. The project will be implemented in the priority areas of 15 provinces."

#### Executing Agency:

Ministry of Sea Exploration and Fisheries  
JL. Veteran III/2  
Jakarta, Pusat, Indonesia  
Contact: Mr. Irwandi Idris, Director, Coast & Beach Affairs  
Tel/Fax: (6221) 384-6994

For more information on these projects or ADB lending opportunities, contact:

1. Ms. Cinnamon Dronsife, U.S. Executive Director, ADB; Tel: (63-2) 632-6051; Fax: (63-2) 632-4003
2. Mr. Stewart Ballard; The U.S. Commercial Liaison Office for the ADB; Tel: (63-2) 887-1164; Fax: (63-2) 887-1164

### Recruiting Canadian Students

The U.S. & Foreign Commercial Service recently published a report on the Canadian student market for U.S. exports of college education and training services.

For Hawaii programs that are interested in targeting this niche sector, the key points of the market are as follows:

1. According to the 1998/1999 academic year, there were 22,746 Canadians studying in the U.S., making up 4.6% of all foreign students in the U.S. Canada is the 6<sup>th</sup> largest source of foreign students to the U.S.;
2. A large portion of Canada's universities is publicly funded. Decreases in government funding have resulted in increased tuition, and have shifted a larger proportion of the financial burden to the students. However, compared to the tuition rates of private universities and the out-of-state tuition at public universities in the U.S., the Canadian tuition is still less expensive;
3. Universities in the U.S. have the best chance of attracting Canadian students due to the prestige of the school (e.g., an Ivy League school), sports (Canadian universities are prohibited from giving sports scholarships), or by offering very specialized programs that are not available in Canada; and
4. There is limited space available in popular degree programs in Canada, and as such more Canadian students are looking at U.S. university programs to fulfill their educational goals.

There are several education trade fairs in Canada (Education Training Job Fair, Toronto College Fair, Toronto Graduate Fair, Vancouver College Fair, and Winnipeg College Fair) at which to market Hawaii's educational programs. Most shows have already been completed for the 2000 calendar year, and are recruiting participants for the upcoming events.

For a copy of a report, send the request form by Fax: (808) 587-3388 or by email to [tradeinvest@dbedt.hawaii.gov](mailto:tradeinvest@dbedt.hawaii.gov).

### Agricultural Exporter Guides

The U.S. Department of Agriculture's Foreign Agricultural Service & Foreign Commercial Service provides updates on the export of agricultural products into various countries.

The latest country reports cover the following markets: **Australia; Taiwan; Hong Kong; Thailand; Singapore; and Malaysia.**

Covered in the report are the following topics:

- Market overview – advantages and challenges for U.S. exporters;
- Local business tips – local business practices and customs, food standards and regulations, general import and inspection procedures;
- Market sector structure and trends – food retail, hotel & restaurant food service, and food processing sectors;
- Best high-value product prospects;
- Key contacts and further information; and
- Statistics

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### Japan – Cosmetics Market

The Japan External Trade Organization (JETRO) recently published a report focusing on the large Japanese cosmetic market.

The report focuses on the following market trends:

1. Based on 1998 figures, the cosmetic market comprised 1 trillion yen in Japan domestic shipments, making it the world's largest market. Over the past five years, the market has grown at 2.8% annual rate;
2. Approximately 32,000 tons of cosmetics – valued at 89 billion yen – were imported into Japan in 1998. Skin care and makeup products accounted for 67% of all imports in value;
3. France is the leading cosmetic exporter into Japan with a 39.6% market share, followed by the U.S. with a 29.5% market share;
4. There are over 1,000 cosmetic manufacturers operating in the Japanese market. Competition is very fierce. New-to-market companies need to conduct thorough marketing surveys and feasibility studies;
5. The Japanese cosmetics market is dominated by skin care products, whereas U.S. cosmetic markets focus mainly on fragrances and makeup products;
6. Cosmetic products become outdated very quickly, and manufacturers must constantly improve existing products and launch new products; and
7. Industry has been long shielded from foreign competition, but due to deregulation and changes in the retailing style, the market has been going through major changes. Deregulation is expected to be implemented by March 2001.

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### Japan – Fragrance Market

The U.S. & Foreign Commercial reports that there is a niche market in Japan for fragrance products, and that the market expected to experience annual growth of 3-5% over the next two to three years.

Fragrance products are defined in this report as products that give a fragrance to the home and other environments – products such as aromatic accessories, scented candles and soaps, essential oils, and potpourri. It does not include air fresheners or air deodorizers.

The market overview is as follows:

1. In the past, the Japanese customers used fragrance products as deodorizers. However, consumer now use fragrance products for health and relaxation reasons -- to enjoy the fragrance and to treat daily stress and strain;
2. There are more than 150 fragrance manufacturing plants in Japan with over 4 employees;
3. The market size is estimated at US\$90 million for the year 2000. Japan is the second largest fragrances and flavor market after the U.S.;
4. Japan is heavily dependent on imported natural fragrances. The Japan Flavor and Fragrance Manufacturers Association estimate that the U.S. has a dominating 33% market share of all imported fragrances;
5. Tariffs for fragrance products ranged from 0% to 9%;
6. The most popular fragrances are those that are natural and subtle; and
7. Due to the increasing popularity of fragrances, other retailers such as gift shops, lifestyle stores, variety stores and cosmetic stores are also expanding their fragrance lines. A listing of Japanese importers, retail stores, and lifestyle stores are listed at the end of the report.

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## Offers

*The trade opportunities listed come directly from the company or trade organization. DBEDT does not endorse these companies or organizations. Please do your own background check before entering into any business negotiation.*

### Offers to Sell

Company in China is looking for buyers of its apparel products. Contact Tang Qi at Jinan Yuanshou Knitting Co., Ltd., 601 Bieyuan Road, Jinan, China. Tel: +86-531-5814704; Fax: +86-531-5950954; e-mail: [jtiys@public.jn.sd.cn](mailto:jtiys@public.jn.sd.cn)

Company in Fiji is looking for importer of its *kava-kava*, wild turmeric, *kura* (*Noni* – *Morinda citifolia*) and wild *gingseng* (*Danidani* – *Northopanax fruticosum*). Contact Brian at Fresh and Wild, Tel/Fax: +679-720840; e-mail: [ellis@is.com.fj](mailto:ellis@is.com.fj)

## Trade Shows, Conferences, & Trade Missions

February 18-20, 2001

The Canadian Food & Beverage Show. Toronto, Canada. Canada's only foodservice trade show dedicated exclusively to food and beverage products. Last exhibit attracted 10,500 attendees and 850 exhibit booths. The U.S. Department of Agriculture will participate through the USA Marketplace Pavilion. For more information, contact the Canadian Restaurant and Foodservices Association,

316 Bloor Street West, Toronto, Ontario, M5S 1W5; Tel: (416) 923-8416; Fax: (416) 923-6164; e-mail: [plunney@crfa.ca](mailto:plunney@crfa.ca)

March 1-3, 2001

Japan Golf Fair 2001. Tokyo, Japan. Next year (2001) marks 100 years since the first golf course was built in Japan. The Japanese golf industry is planning a large event to promote the golf market. The Japan Golf Fair is the only trade show for all golf-related goods and services in Japan. At the last show attracted 44,287 visitors and 156 exhibitors. The U.S. Department of Commerce will have its own U.S. Pavilion section focusing on U.S. golf products and services. Contact the Commercial Service Osaka at Tel: +81-6-6315-5959; Fax: +81-6-6315-5963; e-mail: [charles.reese@mail.doc.gov](mailto:charles.reese@mail.doc.gov)

May 16-18, 2001

International Food Ingredients & Additives Exhibition and Conference. Tokyo, Japan. Japanese customers are becoming increasingly interested in eating a well-balanced diet, and they present new market opportunities for U.S. exporters of food ingredients, additives, equipment, and supplies. Contact E.J. Krause & Associates, Inc., Tel: (301) 493-5500; Fax: (301) 493-5705; e-mail: [Hart@ejkrause.com](mailto:Hart@ejkrause.com)

July 21-23, 2001

ISPO 2001 Summer. Munich, Germany. For the first time ISPO 2001 Summer, a trade fair for sporting goods, will organize a new international trade fair, "World of Diving 2001." The previous Euro Diving 2000 attracted 69 exhibitors from ten countries. It attracted over 1,800 trade visitors from 40 countries. Contact: Munich Trade Fairs North America Corp., Tel: (313) 377-2653; Fax: (313) 377-2660; e-mail: [janice\\_ilg@munichtradefairs.com](mailto:janice_ilg@munichtradefairs.com)

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## Report Request Form

Company: \_\_\_\_\_ Contact person: \_\_\_\_\_  
 Address: \_\_\_\_\_ City: \_\_\_\_\_ Zipcode \_\_\_\_\_  
 Telephone number: \_\_\_\_\_ Facsimile number: \_\_\_\_\_  
 Email: \_\_\_\_\_

Report(s) requested:

- |   |  |
|---|--|
| <input type="checkbox"/> Singapore – Giftware Market  | <input type="checkbox"/> Japan – Fragrance Market                            |
| <input type="checkbox"/> Recruiting Canadian Students | <input type="checkbox"/> France - Swimwear                                   |
| <input type="checkbox"/> Japan – Cosmetic Market      | <input type="checkbox"/> Agricultural Exporter Guide (please specify market) |
| Other: _____  |  |

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